



City of Auburn, Maine

60 Court Street | Auburn, Maine 04210
www.auburnmaine.gov | 207.333.6601

April 9, 2024

Dear Bidder:

The City of Auburn is accepting written proposals for **City Wide Revaluation Services**. The City reserves the right to accept or reject any or all proposals in whole or in part and to waive any informality the City may determine necessary. The City also reserves itself the exclusive right to accept any proposals when it is deemed by the City to be in its best interest. The City of Auburn is governed by Title 1 M.R.S.A. § 401-410, otherwise known as the Freedom of Information Act, which considers bid specifications as public documents. In awarding any proposal, the City may consider, but not be limited to, any of the following factors: Bidder qualifications, price, experience, financial standing with the City, warranties, references, bonding, delivery date, and service of Bidder. Vendors/Contractors shall be current on all amounts due to the City of Auburn prior to the City entering into any contract agreement. All proposals must include FOB to Auburn, Maine unless otherwise specified.

Proposals will not receive consideration unless submitted in accordance with the following instructions to bidders. Please mark **sealed** envelopes plainly: "**BID# 2024-035 Revaluation Services**."

Please respond to Amanda Denning, Purchasing Analyst, via email adenning@auburnmaine.gov with your intent to submit a proposal. Site visits can be scheduled as needed through this same email.

Questions regarding this Request for Proposals should be submitted in writing to Amanda Denning, Purchasing Analyst, at adenning@auburnmaine.gov, via email by **4:00PM, April 29, 2024**. All questions and answers will be posted to the City website in the form of an addendum by **4:00PM May 17, 2024**. <https://www.auburnmaine.gov/Pages/Government/Bid-Notices>

Please submit your proposal to the City of Auburn by **2:00 p.m. Thursday May 30, 2024**. Proposals will be opened at 2:00 p.m. Proposals must be delivered to **Amanda Denning, Purchasing Analyst, 60 Court Street, Auburn, ME 04210** on or before the date and time appointed. No proposals will be accepted after the time and date listed above.

Sincerely,

A handwritten signature in black ink that reads "Amanda Denning".

Amanda Denning
Purchasing Analyst

CONDITIONS AND INSTRUCTIONS TO BIDDERS

1. Bidders shall use the enclosed bid form and schedule of values forms for quotations. Whenever, in bid forms, an article is defined by using a trade name or catalog number, the term "**or approved equal**", if not inserted, shall be implied.
2. Submit a separate unit price for each item unless otherwise specified in the bid request. Award will be made on a basis of each item, or as a group, whichever is in the best interest of the City. Prices stated are to be "delivered to destination".
3. Bid proposals must be completed in full, in ink, and must be signed by firm official. Bid proposal **must be notarized** prior to bid being sealed and will be disqualified if not notarized. Bids may be withdrawn prior to the time set for the official opening.
4. Bids will be opened publicly. Bidders or representatives may be present at bid opening.
5. Awards will be made to the lowest responsible bidder, considering the quality of the materials, date of delivery, cost which meets specification and is in the best interest of the City of Auburn.
6. All transportation charges, including expense for freight, transfer express, mail, etc. shall be prepaid and be at the expense of the vendor unless otherwise specified in the bid.
7. The terms and cash discounts shall be specified. Time, in connection with discount offered, will be computed from date of delivery at destination after final inspection and acceptance or from date of correct invoice, whichever is later.
8. The City is exempt from payment of Federal Excise Taxes on the articles not for resale, Federal Transportation Tax on all shipments and Maine Sales Tax and Use Taxes. Please quote less these taxes. Upon application, exemption certificate will be furnished with the Purchase Order when required.
9. Time of delivery shall be stated. If time is of the essence, the earliest date may be a factor in the bid award.
10. No contract may be assigned without the written consent of the Finance Director or her designate. The contract shall not be considered valid until a purchase order has been issued to the successful bidder.
11. Please state "**Bid #2024-035 Revaluation Services**" on submitted sealed envelope.
12. The City of Auburn reserves the right to waive any formality and technicality in bids whichever is deemed best for the interest of the City of Auburn
13. Bidder will clearly outline all options that are included in the bid price.

GENERAL CONDITIONS

1. Equal Employment Opportunity

The City of Auburn is an Equal Opportunity Employer and shall not discriminate against an applicant for employment, and employee or a citizen because of race, color, sex, marital status, physical and/or mental handicap, religion, age, ancestry or natural origin, unless based upon a bona-fide occupation qualification. Vendors and contractor or their agents doing business with the City shall not violate the above clause or the Civil Rights Acts of 1964. Violations by vendors shall be reviewed on a case-by-case basis and may mean an automatic breach of contract or service to the City of Auburn.

2. Save Harmless

The Bidder agrees to protect and save harmless the owner from all costs, expenses or damages that may arise out of alleged infringement of patents of materials used.

3. Subcontracting

The Bidder shall not subcontract any part of the work or materials or assign any monies due it without first obtaining the written consent of the municipality. Neither party shall assign or transfer its interest in the contract without the written consent of the other party.

4. Warranty

The Bidder warrants that all work will be of good quality and free from faults and defects, and in conformance with the specifications. All work not so conforming to these standards may be considered defective. The Bidder agrees to be responsible for the acts and omissions of all its employees and all subcontractors, their agents and employees, and all other persons performing any of the work under a contract with the Bidder.

5. Bonds, Retainage and Payments

Payment and performance bonds will be required from the contractor who is awarded this contract. Retainage in the amount of 10% will be held from each progress payment and shall be released at the discretion of the Project Manager. Payments shall be made by the City to the Contractor 30 days after receipt of the request for payment.

6. Permits and Fees

The selected Contractor is required to obtain all necessary permits through the City's Planning and Permitting Department. The City will waive the associated fees.

City of Auburn, Maine
Request for Proposals
City-Wide Assessing Revaluation Services
"Full List and Measure Revaluation"

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PURPOSE

The City of Auburn, Maine, herein referred to as “the City”, is seeking proposals from qualified, interested revaluation companies to submit their Qualifications and a Detailed Cost Proposal for the full measure and list appraisal and revaluation within the corporate limits of the City of Auburn, Maine. This proposal includes revaluation of all taxable and tax-exempt properties to arrive at full and true value to be effective no later than the assessment date of April 1, of the implementation year specified in the contract. Results will be validated by the City Assessor upon submission.

The values to be determined shall be “just value” as defined in Maine Statutes and Maine Supreme Court decisions. The basis of valuation shall be the recognized methods of appraising real and personal property. At the conclusion of the revaluation, it is anticipated that property will be valued at 100% of full market value.

COMMUNITY INFORMATION

Auburn – City Description

Auburn is a city in south-central Maine, within the United States. The city serves as the county seat of Androscoggin County. The population was 24,061 at the 2020 census. Auburn and its sister city Lewiston are known locally as the Twin Cities or Lewiston–Auburn

According to the United States Census Bureau, the city has a total area of 65.74 square miles of which 59.33 square miles is land and 6.41 square miles is water. The City of Auburn assessed 56.70 square miles in 2023. The *assessed* figure excludes roadways and water bodies (~9.04 acres were not assessed).

The last full revaluation of the City of Auburn was completed in 2006 and fully implemented in 2007. Due to recent market conditions, the City’s Assessor has made recent market adjustments to certain classes of property including single-family, multi-family, agricultural land, mixed-use properties, and others.

The City’s current CAMA system is Assess Pro 5, a Patriot Properties product. Most users of the CAMA commonly refer to it as “Patriot”. Patriot Properties is a division of Catalis. In addition to the CAMA the City also uses Eagleview oblique imagery which is available to use as an analysis tool. The most recent aerial imagery flyover was 2022 with subsequent flyovers scheduled for the spring of 2024 and 2026.

Property Mix According to Land Use

The City features a diverse tax base mix, the following shows parcel counts according to general land use:

Property Type (land use)	Parcels	Area (acres)
Residential 1-4 family	7,139	14,988.00
Vacant Land	1,113	12,660.00
Commercial	596	2,569.08
Residential 5+ family	160	223.00
Industrial	151	1,995.49
Government	140	2,917.77
Utility	99	446.00
Other	66	511.00

~totals 9,464 36,310.34

Additional City and property descriptions are contained in the addenda found on the City of Auburn’s Website (refer to bid page):

- Addenda A: A summary list of Auburn’s parcels.
- Addenda B: An exhibit detailing the City’s present “Tax Base Mix”.
- Addenda C: A list of unique, special use, and large industrial properties.
- Addenda D: The 2023 Assessor’s Report, which is a summary of the 2023 committed valuation data.

SCOPE OF SERVICES and GENERAL EXPECTATIONS

The scope of the revaluation requires the **complete appraisal and revaluation** of all taxable and exempt real property within the corporate limits of the City of Auburn, Maine.

The values to be determined shall be full market value as defined in the Maine Statutes and Maine Supreme Court decisions. Basis of valuation shall be the recognized methods of appraising real property, as defined by the Appraisal Institute and the International Association of Assessing Officers (IAAO) and as approved by Maine Revenue Services in accordance with the provisions of 36 MRS §§ 112, 328, 330 and 331 and revaluation guidelines by rule, Chapter 208.

The Respondent must fulfill all duties imposed by the Statutes, Ordinances, and Property Assessment Manual on an Assessor. The following scope of services outlines Assessor and revaluation tasks. In order to match services to potentially available funding, the final scope of services will be established with a contract for services should one be forthcoming. Any such contract will be based on several considerations including, but not limited to bid costs, proposed completion schedules and available funding. The following considerations will apply to all tasks ultimately included in the contract for services.

The scope of work herein may be adapted considering the capabilities of any potential vendor and *may be negotiated* to include the use of subcontractors or elements of the project to be completed in-house by the City's assessing division. Any such provisions shall be clearly defined in the final contract, otherwise the Company is responsible for all aspects of the revaluation.

Objective 1 - RESIDENTIAL REVALUATION

Inspection and Valuation of Residential Parcels

General listing of Major Tasks to be completed by the Respondent:

1. Analyze all recent sales based on sale qualifications completed by the City Assessor's Office or the Respondent, when so required, for use in all aspects of the revaluation process.
2. Review and analyze existing Residential Class neighborhoods, types of properties, and current trends and modify neighborhoods as required.
3. Determine and build appropriate land value tables and influence factors.
4. Development of residential cost schedules.
5. Field review and assess Residential Class properties that were under partial construction as of January 1st of the prior year.
6. Field review and assess new Residential Class construction as of April 1, of the implementation year. This will include any additions, remodels, or alterations to existing improvements.
7. Field review and measure, as deemed necessary, all Residential Class Parcels with building permits for exterior remodeling, detached buildings, and other miscellaneous permits.
8. Field review and measure all other Residential Class properties.
9. Review and revise parcel classifications as required based on data collected.
10. Implement use value assessments of Classified lands per specifications set forth by the Maine Revenue Services.

11. Analysis of Income and Expense information collected by the City Assessor's Office for all income producing Residential properties. Collected data will be used by the Respondent to develop appropriate income and expense models to be associated with types of structures and land uses, to develop appropriate capitalization rates and to apply the principles of the income approach. Data analyzed for income producing properties shall include rental rates, leasehold improvements, vacancy rates, and income and expense data. This information shall be maintained in a secure location at the City Assessor's Office.
12. Independently determine the value of Residential Class parcels using standard approaches to valuation.
13. Complete taxpayer conferences as needed.
14. Defend values beyond taxpayer conferences through the abatement process and any following appeals.

Objective 2 – COMMERCIAL REVALUATION

Inspection and Valuation of Commercial Parcels. For the purposes of this revaluation project commercial parcels means all non-residential properties including industrial, utility, power generation, and other special use properties.

General listing of Major Tasks to be completed by the Respondent:

1. Analyze all recent sales based on sale qualifications completed by the City Assessor's Office or the Respondent, when so required, for use in all aspects of the revaluation process.
2. Review and analyze existing Commercial Class neighborhoods, types of properties, and current trends and modify neighborhoods as required.
3. Determine and build appropriate land value tables and influence factors.
4. Development of cost schedules.
5. Field review and assess Commercial Class properties that were under partial construction as of January 1st of the prior year.
6. Field review and assess new Commercial Class construction as of April 1, of the implementation year. This will include any additions, remodels, or alterations to existing facilities.
7. Field review and measure, as deemed necessary, all Commercial Class Parcels with building permits for exterior remodeling, detached buildings, and other miscellaneous permits.
8. Field review, as deemed necessary, Commercial Class parcels with no sale or building permit issued.
9. Review and revise parcel classifications as required based on data collected.
10. Implement use value assessments of Classified lands per specifications set forth by the Maine Revenue Services.
11. Analysis of Income and Expense information collected by the City Assessor's Office for all improved Commercial Class parcels. Collected data will be used by the Respondent to develop appropriate income and expense models to be associated with types of structures and land uses, to develop appropriate capitalization rates and to apply the

principles of the income approach. Data analyzed for income producing properties shall include rental rates, leasehold improvements, vacancy rates, and income and expense data. This information shall be maintained in a secure location at the City Assessor's Office.

12. Independently determine the value of Commercial Class parcels using standard approaches to valuation.
13. Complete taxpayer conferences as needed.
14. Defend values beyond taxpayer conferences through the abatement process and any following appeals.

Objective 3 – VACANT LAND REVALUATION

Full Valuation of remaining land not assessed in objectives 1 and 2.

General listing of Major Tasks to be completed by the Respondent:

1. Analyze all recent sales of vacant land.
2. Review and analyze existing neighborhoods, types of properties, and current trends and modify neighborhoods if required.
3. Determine and build appropriate land valuation schedules and influence factors (for frontage, size, shoreline, etc. as applicable).
4. Review and revise parcel classifications as required based on a review of data collected.
5. Independently determine the value of land using the market approach to valuation.
6. Development of land pricing schedules.
7. Inspect vacant parcels as possible to discover any improvements not previously discovered and list said improvements.

Objective 4 - PERSONAL PROPERTY ANALYSIS

In addition to the scope of services above, the City is requesting an independent analysis of Personal Property located in the City. In particular:

1. Advisory opinions concerning the efficacy of the City's current personal property appraisal methods and accuracy of personal property depreciation tables.
2. If deficiencies are identified, the Company will recommend solutions.
3. If a new CAMA system is adopted, the Company will assist in establishing all personal property features and instruct the assessing staff how to use it.

General Expectations

Responsibilities of the Company

Except as negotiated, the company shall furnish all labor, materials, supplies, software, and equipment, and shall perform all work for the revaluation including data entry in strict accordance with these specifications and best practices.

The Company's work product will show that all three methods of valuing property, the cost, income, and sale comparison approaches were considered and utilized where applicable.

CAMA Selection

The valuation models must be calibrated using methodology, tables, and coefficients that are fully compatible with the City's CAMA software. This shall be either the current Patriot, AssessPro5 or another suitable CAMA to be adopted. Upon approval by the assessor all values will be entered into the CAMA system by the Company.

The City's CAMA, Patriot AP5 is currently fully functional, any alternative must possess similar features and capabilities. Any alternate CAMA at a minimum:

- Must have report options that integrate with City's GIS systems (ESRI) or a detailed plan for adopting and implementing alternatives.
- Must have a public facing website option (currently Webpro).
- Must have document archive capability (documents links)
- Must have reports or extracts that integrate with the City's financial software to produce a viable bridge to tax collection software and the production of a commitment book.

If a new CAMA system is adopted, the Company will provide complete and comprehensive instruction on how to use it. Any cost associated with a new CAMA system will be borne by the company, including the first year of any associated service agreements, website hosting, or cloud services. The selection of an alternative CAMA system will also be subject to screening by the City's IT department to determine its suitability per their security and other standards.

PROJECT STAFFING

Qualifications of personnel

The minimum qualifications for revaluation personnel can be found in Maine Revenue Services rule, Chapter 128: Guidelines for Professional Assessing Firms that Provide Revaluation Services to Municipalities. All personnel assigned to this revaluation shall be subject to the approval of the Assessor and may be removed from this revaluation by the Company upon written recommendation of the Assessor. Personnel assigned to this revaluation shall have adequate competency at the appropriate level at which they will be working on this revaluation. At the beginning of the project the Company shall submit to the City a list of all personnel assigned to the project with their duties, starting date, and qualifications and shall maintain this list throughout the project.

Staffing roles, competency, and ethical responsibilities

Revaluation Manager - The administration of this revaluation shall be assigned by the Company to a designated Revaluation Manager (or equivalent title). The Revaluation Manager will have adequate experience as a revaluation supervisor and have at least five years of practical appraisal experience. That experience should be with a jurisdiction of similar size and property type composition.

When the revaluation manager does not have experience with a particular property type or appraisal problem, The Revaluation Manager may enlist other qualified revaluation staff, consultants, sub-contractors, or other content experts to attain competency. It is the company's

responsibility to ensure they have the necessary competencies to produce credible assignment results. Any party providing significant expertise to any portion of the revaluation process must be properly named and credited for their contribution.

The revaluation manager shall serve as an advisor to the Assessing Department in determining all land, building, improvement, and other property values for this revaluation.

All staff employed or contracted by the company shall be competent to perform their duties. This includes any reviewer, appraiser, lister, or measurer.

Conduct of Company Employees

The company is responsible for the conduct of their employees. It is the expectation that *all* revaluation staff will adhere to the canons of the IAAO code of Ethics and Standards of Professional Conduct, be task orientated, be good representatives of the City of Auburn, and to act in a manner that engenders the public trust.

As a condition of this contract, the Company's employees shall treat the residents, employees, and taxpayers of the City with respect and courtesy. The Company shall take appropriate and meaningful disciplinary action against those employees who violate the terms of this provision.

Employment, release, or transfer

Whenever new personnel are assigned to this revaluation in any capacity, the Assessor shall be notified in writing of the individual's name, qualifications, starting date, and assigned duties. Whenever any person who is employed by the Company and is assigned to this revaluation is released from employment or transferred from this revaluation, the Assessor shall be notified in writing of the individual's name and date of occurrence.

Identification

All field personnel shall carry and display suitable photo ID cards, which shall be issued by the City of Auburn. Any personnel who misplace their ID card will not be allowed in the field until a new ID card is obtained. All vehicles used by field personnel shall be reported to the City of Auburn and the Assessor giving the license number, make, model, year, and color. In the course of their duties, field personnel shall show their city identification to any party upon request. Revaluation personnel shall be identified as part of the public information campaign, which may include their names, photographs, and credentials on various types of media.

Conflict of Interest

Any personnel having a conflict of interest shall report that conflict of interest to the Revaluation Manager, Assessor, or other party as appropriate. Examples of conflicts include appraising property which they own or have an interest in, close relationships with property owners or other stakeholders, restraining orders or other legal conflicts, and more. A conflict of interest, real or perceived, may be grounds for the employee to recuse themselves from a specific assignment.

REVALUATION SCHEDULE

Start date

The company shall start the revaluation as soon as practical after signing the Contract, or upon a date as agreed by the Assessor. Thereafter the Company must continue in a diligent manner to ensure completion of scheduled tasks.

Project phases/schedule

The following list is a potential model for tasks and phases of the project. The company may propose their own task list and timeline based on their scope of work determination if all project steps are accounted for. As noted above, the Company will act in good faith to accomplish these tasks and according to best practices in mass appraisal. As agreed, some of the project tasks may be completed by or in conjunction with the Assessing Department. The form of the revaluation schedule will be in a mutually agreed format, such as a project calendar, Gantt chart, checklist, or other suitable list.

Significant phases in the revaluation process (example):

- Phase 1. Public information and media releases*
**Public information campaigns may be necessary during all phases*
- Phase 2. Residential data collection
- Phase 3. Commercial data collection
- Phase 4. Neighborhood analysis
- Phase 5. Land valuation and analysis
- Phase 6. Building and improvement costs
- Phase 7. Market analysis
- Phase 8. Income analysis (as applicable)
- Phase 9. Personal property analysis
- Phase 10. Final reconciliation and report delivery
- Phase 11. Valuation Notices, Hearings, and Appeals Process (primary cessation of project)
- Post project follow-up

Project deadlines/penalty

The project schedule and ultimate end date of the project shall be specified in the Respondent's Timeline set forth in the **Proposal Format**. Upon acceptance of the Contract the timeline will be considered binding. Failure to complete scheduled phases of the project may incur a penalty.

It is understood that unforeseen circumstances may contribute to delays. The Company will communicate any anticipated delay to the assessor in writing. The Assessor or City Manager may at their discretion approve of said delay for reasonable cause.

Unapproved delays will incur a penalty at a rate of 5% of the total project cost for every quarter (3 months) beyond the agreed upon cessation of primary revaluation project.

RESPONSIBILITIES OF THE REVALUATION COMPANY

It is understood and agreed that the reappraisal of properties covered by this agreement shall conform to the procedures and technical requirements of the Assessor.

Expectation of Good Communication

The Company's Revaluation Manager and the Assessor (or designee) shall discuss the progress and various other details of the revaluation at the end of each month following the execution date of this contract. These discussions may be scheduled to occur more frequently if they are found to be necessary by the city.

Deliverable Products

Documents produced by the Company will be used for the purposes of explaining and defending the concluded valuation to taxpayers, City officials, Maine Revenue Services, and others. It is therefore imperative that any reports and other documentation be clear and complete.

Documents, records, data, and other material, in manual, mechanical, or electronic form procured or produced in the performance of the revaluation will become the sole property of the City at the conclusion of the revaluation as determined by the Assessor. The documents, records, data, and other materials to be included:

- The revaluation company's initial scope of work determination.
- Documentation of procedures used throughout the revaluation.
- All manuals used in any phase of the revaluation.
- Data collection summaries and valuation manuals used in maintaining and updating values.
- Detailed valuation manuals, including tables, models, and formulas used in applying the cost, sales comparison, and income approaches to valuation as applicable.
- Source information used in the development of cost, sales comparison, and income approach schedules.
- A final computer-generated property record card for each parcel. Record cards will conform to the City's existing property record format, or a comparable alternative approved by the Assessor.
- New photos of all buildings in the city (digital format).
- As applicable new sketches of all measured buildings in the city.
- All manual and computerized reports supporting valuation formulas and values for vacant land and improved properties.
- Field review documents reflecting preliminary values, adjusted preliminary values, and any notes relative to informal review actions.
- A report on all informal hearings among property owners and the Company's representatives. The report should contain the results of those hearings including whether values were adjusted and a summary of the changes.
- A final valuation list with all new valuations reported.

- All documents and backup documentation shall be in the form of a hard copy and electronically.
- Any other documents aiding the City's understanding of the methods and results of the revaluation process.
- The relevant documents above will be collected in a "valuation manual" and should include all final grading and pricing schedules used.
- A final certification of the revaluation from the Company shall be transmitted at the conclusion of the project.

The Company will maintain a work file pertaining to the revaluation assignment in accordance with USPAP and all other applicable laws, rules, and regulations.

Property data, and/or appraisals and records shall not be made public until after the assessment notices are mailed, except to the extent public access may be compulsory under the provisions of applicable law.

Good Faith

The company shall, in good faith, use its best efforts to assist the Assessor in determining accurate and proper market valuations, and shall not undervalue or overvalue any land, building, or other property to avoid or minimize its responsibilities under the Contract and Contract Conditions.

The Company is responsible for fulfilling all the stated requirements in the Contract and Contract Conditions in a timely manner, consistent with a good faith effort. The Company shall provide training for appropriate City personnel, adequate to provide them with the knowledge necessary to understand and use the appraisal system and/or other software installed by the Company.

Public Relations

The parties to this revaluation recognize that a good public relations program is required in order that inhabitants of the City may be informed as to the purpose, benefits, and procedures of the revaluation. The Company shall, with the Assessor's approval and participation, conduct a program of public information which may include direct mailings, handouts, interviews with the press (newspaper, radio, television, etc.), other electronic media, and the City's website. The Company shall participate in meetings with citizens, public officials, and other stakeholders as necessary during all phases of the revaluation. The Company and the Assessor will agree on which public relation efforts are most effective, necessary, and reasonable. At a minimum, the Company will engage in public relations efforts at the commencement of the revaluation, during the data collection and inspection phases of the project, and at the conclusion of the revaluation. Additional public relation efforts may be required for informal hearings and formal board of assessment review hearings.

Property Inspections

It is the goal that all physical improvements be fully inspected on the interior and exterior as applicable. This includes measuring and listing each property's physical characteristics. The

scope of property inspections includes all improvements in the City namely buildings, outbuildings, yard items, and special features.

Ahead of inspections, property owners will be given advance notice that inspections will be taking place and when. For property owners who are unable to comply with the inspection window offered by the company, alternate inspections will be scheduled as needed. Inspections and follow-ups must be offered at times convenient to residential property owners, namely evenings and weekends.

Interior and exterior construction details, quality of construction, age, condition, replacement values, depreciated values, and fair market value will be analyzed and reported according to mutually agreed best inspection practices.

For properties that could not be inspected on the first attempt, additional attempts will be made by the Company. If a property owner refuses entry, such refusals will be documented.

Inspections should only take place when a property owner or duly authorized representative is present. The inspection team is asked not to inspect a property without the owner's consent or when only children or other vulnerable populations are present.

Assessment Notices

A notice shall be sent, at the Company's expense, by first class mail, to each owner of record as of April 1, of the implementation year setting forth the old assessment of land and buildings as well as the new valuation that has been placed upon the property identified in the notice. The notice shall be prepared in duplicate and in conformity with Maine Law. The duplicate copies will be arranged in map lot sequence and shall be left with the Assessor.

Further, information specifying the dates, times, and place of informal hearings, with an explanation of the purpose of a revaluation and how assessments were determined will be enclosed. Such notices and information shall be subject to approval by the City.

Informal Valuation Review Hearings

The Company shall hold informal hearings, at such times and at such locations as the City may specify. The meetings are an opportunity for owners of property, or their legal representatives, to discuss with knowledgeable members of the Company's staff the assessed valuations of their property. The Company's personnel shall explain the manner and methods of arriving at a value. Informal hearings should be accessible to property owners and should be scheduled at times they can attend; these may be held on weeknights and Saturdays as well as during normal business hours.

The Company, in cooperation with the City, shall schedule enough hearings and provide qualified personnel certified by the State of Maine and approved by the City to handle said hearings expeditiously and fairly.

The Company shall make provisions to reinspect property when material facts are in dispute. Reinspection can occur upon recommendation of the assessor or at the request of the property owner. All secondary inspections shall be clearly documented.

Defense of Values

The Company agrees that a knowledgeable representative of the Company shall be present at any Property Tax appeal stemming from the new valuation determined during the revaluation.

In the event of any appeal to the courts, the Project Manager or duly qualified representative shall be present at the hearing to testify as a witness.

PROPOSAL FORMAT

All submitted proposals from the company shall include:

1. All information pertaining to the Respondent's technical and managerial approach to completing the revaluation.
2. Names and qualifications of staff included in the revaluation.
3. Timeline for the Revaluation Schedule. The timeline should specify the beginning of the project, all ensuing phases including the anticipated cessation date of the primary revaluation tasks. The timeline should also provide for any follow-up responsibilities such as appeal hearings.
4. The Proposal Form, Outlining the total cost for revaluation proposal including: Revaluation costs of all real and personal property (calculations, appeals, public hearings / presentations, and data entry Total cost of the software, hardware, integration, maintenance and licensing cost.
5. Name and telephone number of person(s) to be contacted for further information and clarification.
6. List of all municipal revaluations completed during the past five (5) years, including client contact, and telephone number.
7. Number of years engaged as a Company, corporation, partnership, or individual specializing in governmental tax revaluation services.
8. Name of revaluation supervisor (or equivalent) to be assigned to this revaluation, along with resumes of staff to be assigned to the revaluation.
9. A list of revaluation Contracts for which the Company is currently committed.
10. Description of the Company's public relations program that would be used during the revaluation.
11. Any other supplementary information that in the opinion of the Company may assist the City in evaluating the Proposal.

BID PROPOSAL FORM

Due: Thursday May 30, 2024

To: City of Auburn
Amanda Denning, Purchasing Analyst
60 Court Street
Auburn, ME 04210

The undersigned individual/firm/business guarantees this price for thirty days (30) from the proposal due date. The undersigned submits this proposal without collusion with any other person, individual, or firm or agency. The undersigned ensures the authority to act on behalf of the corporation, partnership or individual they represent; and has read and agreed to all of the terms, requests, or conditions written herein by the City of Auburn, Maine.

By signing this form, the firm listed below hereby affirms that its bid meets the minimum specifications and standards as listed above.

Signature _____ Company _____

Name (print) _____ Title _____

Phone Number _____

Address _____

Email Address _____

STATE OF MAINE

_____, SS.

Date: _____

Personally, appeared _____ and acknowledged the foregoing instrument to be his/her free act and deed in his/her capacity and the free act and deed of said company.

Notary Public

Print Name

Commission Expires _____

Addendum Acknowledged:

_____ Date: _____ Initials: _____

_____ Date: _____ Initials: _____